

Product Training Products

Where “Lean” principles are considered common sense and are implemented with a passion!



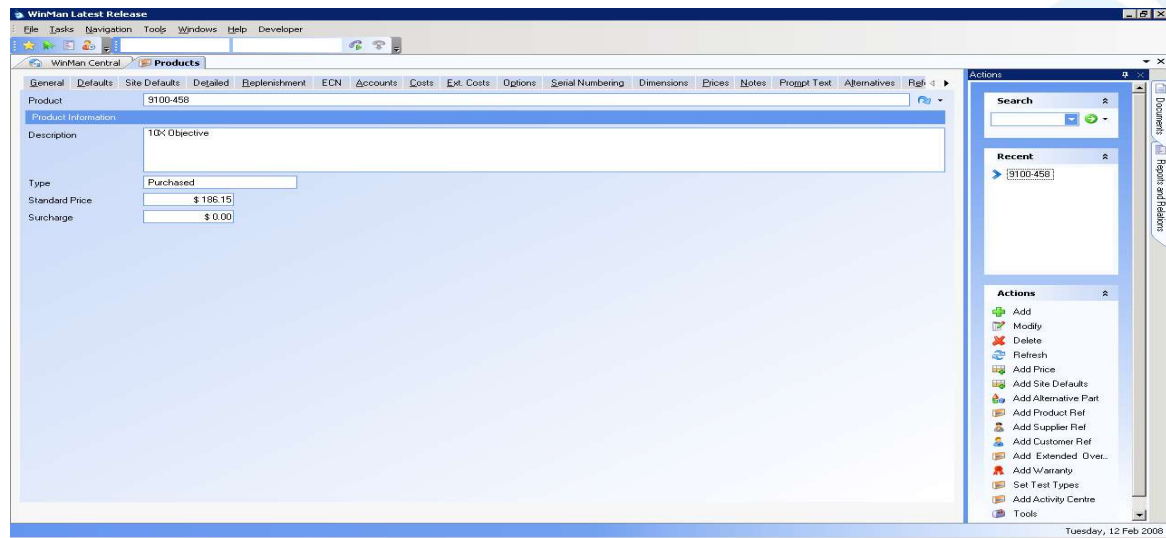
Products



*Products are items that are inventoried.
All movements, receipts and issues are
recorded in order to maintain the
perpetual inventory.*

Products

General Tab



Products

- ❑ **Product** – The product number
 - Product naming scheme to be used
 - Intelligent
 - Semi-intelligent
 - Next number

SYSTEM SETTING:

If a sequential number is required for new part numbers use the Products setting **Automatically default product ID**. This will automatically create a 10 character sequential part number

SYSTEM SETTING:

If a part number is automatically being created using the above setting, the default length of 10 characters can be amended. Use the Products setting **Automatic default product ID length** to change the length. Enable the setting and set the value to the number of characters the part number should be

SYSTEM SETTING:

If a part number is automatically being created for new part numbers and a prefix is required use the Products setting **Automatically default product ID prefix**. Enable the setting and set the value to the prefix for the new part numbers

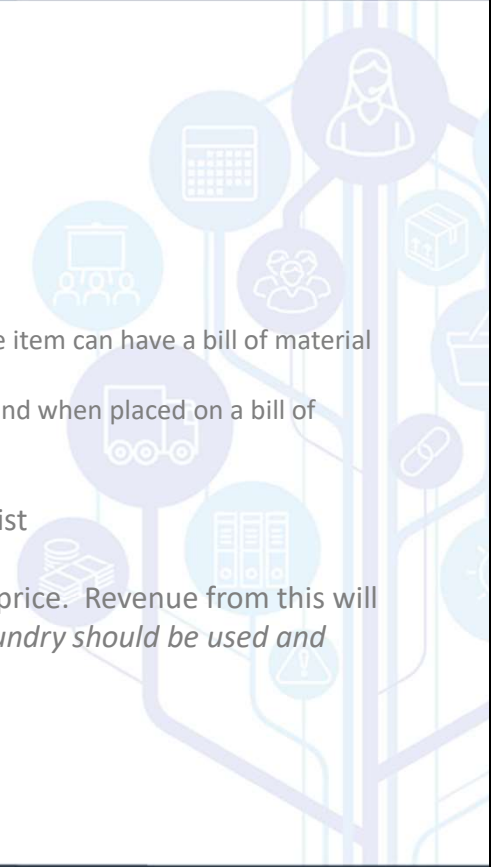
Products

- ❑ **Description** – The description of the part (300 characters)

- ❑ **Type** – Must be one of the following;
 - **Standard Assembly** – Items that are manufactured
 - **Purchased** – Items that are purchased and can not have a bill of material
 - **Purchased Assembly** – Items that the system will treat as a purchased part for MRP, but the item can have a bill of material and be made using a Manufacturing Order or Backflush
 - **Transient Assembly (also known as Phantoms)**– Items that are a manufactured assembly and when placed on a bill of material, will be exploded down to components

- ❑ **Standard Price** – Default price for item when added to a sales order if no price lists exist

- ❑ **Surcharge** – Additional charge that will be added to the sales order in addition to the price. Revenue from this will go to the same GL account as the item. **NOTE:** *If a different GL account is needed, a sundry should be used and added to the sales order as a second item.*



Products

Defaults Tab

WinMan Latest Release

File Tasks Navigation Tools Windows Help Developer

WinMan Central Products

General Defaults Site Defaults Detailed Replenishment ECN Accounts

Product: 9100-458

Product Details

Cross Reference:

Location: MAIN

Classification: CONSUMABLE

Department: PURCHASING

Unit of Measure: EACH

Pack Size: 1

Commodity Code: 33

Tax Code: [Default]

Default Version: 000001

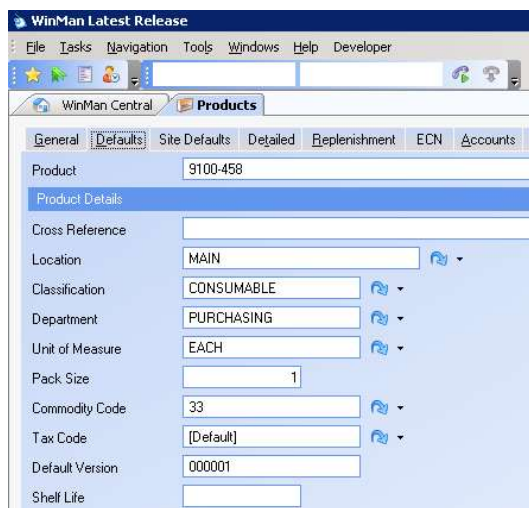
Shelf Life:

- ❑ **Cross Reference** – Used in Keyword search for parts
- ❑ **Location** – Provides a default location when receiving for a purchased part or a default location when a manufactured item is being finished (but can be changed at time of finish)
- ❑ **Classification** – A way that allows you to classify items for reporting. Inventory and sales reports currently use classifications for groupings. Can be used for product lines.
- ❑ **Department** – A way to group parts for responsibility and reporting. This could be a buyer code.
- ❑ **Unit of Measure** – The unit of measure should be the lowest factor of the unit of measure used for the part. It is how units will appear on bills of material. If a conversion factor is needed for customers or suppliers, unit of measure factors found in the Unit of Measure program, can be used to convert quantities.

For example, Widget A is stocked in Inches and sold in Feet. The unit of measure in Products would be Inches and a unit of measure factor would be Feet with a conversion factor of 12

Products

Defaults Tab



The screenshot shows the WinMan Latest Release software interface. The main window is titled "WinMan Latest Release" and has a menu bar with "File", "Tasks", "Navigation", "Tools", "Windows", "Help", and "Developer". Below the menu bar is a toolbar with various icons. The main area is divided into several tabs: "WinMan Central", "Products", "General", "Defaults", "Site Defaults", "Detailed", "Replenishment", "ECN", and "Accounts". The "Products" tab is active, and the "Defaults" sub-tab is selected. The "Product" field contains the value "9100-458". Below this, the "Product Details" section is expanded, showing the following fields:

Cross Reference	
Location	MAIN
Classification	CONSUMABLE
Department	PURCHASING
Unit of Measure	EACH
Pack Size	1
Commodity Code	33
Tax Code	[Default]
Default Version	000001
Shelf Life	

- Pack size** – The minimum quantity size that an item can be moved in. Used for reference only
- Commodity Code** – A way to identify items by commodity code. Can also be used as an additional way to group parts for reporting
- Tax Code** – A tax code for the item that is used for reference only
- Shelf Life** – The shelf life number of days will be added to the date an item is finished on a manufacturing order to default an expiration date. This can be changed by the user when the Manufacturing finish is being completed.

For example, If an item is finished on Jan 3 and its shelf life is 10 days, the suggested expiration date will be Jan 13.

Products

Detailed Tab

WinMan Latest Release

File Tasks Navigation Tools Windows Help Developer

WinMan Central Products

General Defaults Site Defaults **Detailed** Replenishment ECN Accounts Costs Ext. Costs Options Serial Numbering Dimensions Prices Notes Prompt Text Alternatives Right

Product 3100-458

Product Information

Purchase Discount [Default]

Sales Discount [Default]

Price Group [Default]

Barcode

Superseded By

Product Pricing [Any]

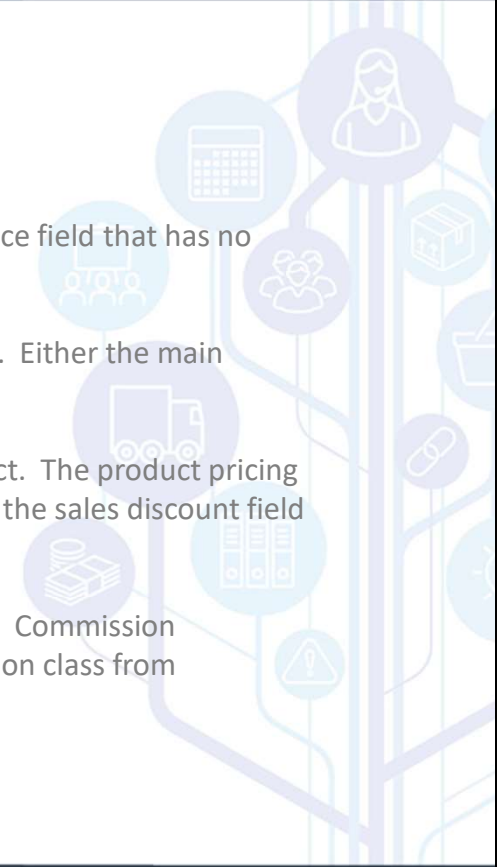
Commission Group

- ❑ **Purchase Discount** – A discount that will occur on purchase orders that will over-ride the discount from the vendor. If discounts are determined by vendor, this field should be left as Default
- ❑ **Sales Discount** – A discount that will occur on sales orders that will over-ride the discount from the customer. If discounts are determined by customer, this field should be left as Default.
- ❑ **Price Group** – Used to group items for the purpose of updating prices based on price list. This can be used if multiple items appear on multiple price lists at the same price. Most instances this will be Default.

Products

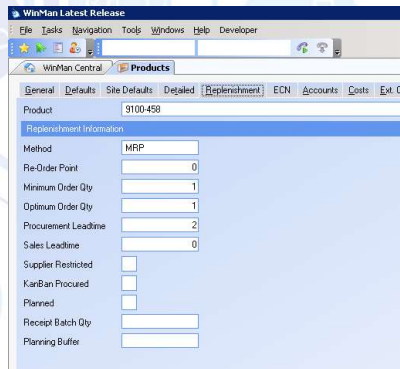
Detailed Tab

- Barcode** – A free text field that can be populated if a barcode is required. A reference field that has no affect on the system
- Superseded by** – An alternate product that is suggested at time of sales order entry. Either the main product or the superseded by product can be selected on the sales order.
- Product Pricing** – Used when a discount is dependant on both customer and product. The product pricing is used to group parts that will have the same discount structure. This will override the sales discount field above.
- Commission Group** – Used to group like parts that will have the same commissions. Commission percentages are calculated by determining the commission group and the commission class from customers.



Products

Replenishment Tab



- ❑ **Method** – Can be MRP or ROP. MRP will take into account supply and demand, factor in due dates and order quantities and make suggestions for proposed purchase orders and proposed manufacturing orders. ROP will wait for stock levels to fall below the re-order point and then generate proposed purchase orders and proposed manufacturing orders.
- ❑ **Re-Order Point** – A safety stock level that both MRP and ROP will look at and generate proposals once stock is below.
- ❑ **Minimum order quantity** – The minimum quantity that will be generated on a proposed order.
- ❑ **Optimum Order quantity** – If a proposed order requires more than the minimum quantity, the quantity will increase by a factor of the optimum quantity. *For example, the minimum quantity is 8 and optimum quantity is 4. If the demand for the item is 17 the proposed order will be for 20.*

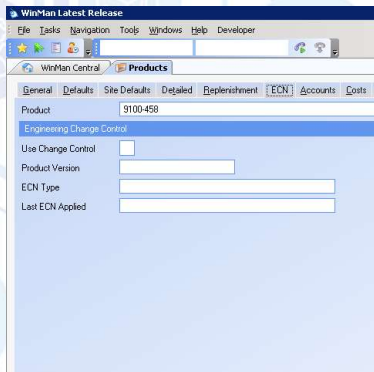
Products

Replenishment Tab

- Procurement lead time** – The number of days that is required to make a product or to buy a product.
- Supplier Restricted** – Purchase Orders can only be created for suppliers that have a supplier cross reference entry.
- Kanban Procured** – No proposed orders will be created through MRP or ROP.
- Receipt Batch Qty** – The quantity that will be the maximum batch quantity for a purchase order receipt. *For example, if the receipt batch quantity is 10 and 70 are received, 7 lots of 10 will be received into inventory.*
- Planning Buffer** – The number of days added to the procurement lead time to calculate due dates. Extra days that are used with due date to buffer against delays.

Products

ECN Tab



- Use change control** – Check if ECN control is required
- Product Version** – The version of the product, can be a letter of number. When a product is added to inventory the Product version is assigned to the batch, and will follow that batch for tracking purposes.
- ECN Type** – The current ECN
- Last ECN Applied** – The last ECN applied to the part. If a change is made to a field in products that is under ECN control, the user must pick an ECN that relates to the change.

Products

Accounts Tab

General Ledger Accounts	
Inventory	1310
Work In Progress	1330
Labor	6111
Overhead	6111
Material Variance	5710
Labour Variance	5710
Overhead Variance	5710
Sales Type	4110
Sales Division	01
Duty	5620
Duty Value Rate	0%

- Inventory** – An Asset account that is used for inventory and is from the system defaults. Can have separate accounts for Raw Material, Sub-assemblies and Finished Goods.
- Work in Progress** – The system default WIP account will act as the default for this field. In most situations the WIP account will not be changed from the default.
- Labour** – The labour recovery account that is used as the offset when labour is added during a Manufacturing Finish, or a Goods receipt.
- Overhead** – The overhead recovery account that is used as the offset when overhead is added during a Manufacturing Finish, or a Goods receipt.

Products

Accounts Tab

- Material Variance** – Variance account for any material variances for Manufacturing Finishes
- Labour Variances** – Variance account for any labour variances for Manufacturing Finishes
- Overhead Variances** – Variance account for any overhead variances for Manufacturing Finishes
- Sales Type** – The default sales account used when no price list is found
- Sales Division** – If revenue is separated by division and products align with specific divisions, the division field should be used. This will override the sales order prefix or division from the customer master. If not applicable, should be left as “Default”
- Duty** – The duty account used for the duty value. When an item is received with a duty value, the value of the inventory will be increased by the duty value. The duty account is the credit account used to offset the inventory value.
- Duty Value Rate** – The rate at which duty will be calculated for a product

Products

Costs Tab

Standard Costs	
Material	186.15
Labor	2,220.00
Overhead	0.00
Activity Based	0.00
Total	2,406.15

Costs At This Level	
This Level	99
Labor	0.00
Overhead	0.00
Activity Based	0.00

Overhead Recovery Method	
Type	Both
Absolute Value	0.00
Percentage Uplift	0%

Automatically Recover From Standards	
Labor	<input checked="" type="checkbox"/>
Overhead	<input type="checkbox"/>
Activity based	<input checked="" type="checkbox"/>

Latest Costs	
Latest Cost	0.00
Latest Cost Date	Thu, Jun 14 2007

Average Onhand Costs	
Average Cost	0.00
Average Cost Date	

- Standard Material** – For purchased parts, this can be manually entered as the standard material cost for the item. Manufactured items, must have a cost roll up completed for standard material cost, no manual entry is allowed.
- Standard Labour** – For manufactured items, the standard labor value.
- Overhead** – For manufactured items, the standard overhead value.
- Activity Based** – For manufactured items, the standard cost of all the routing steps.

NOTE:

This is not traditional Activity Based Costing. To the right of the Standard costs, are Costs at this Level. These are the costs for the specific part, and do not include sub-assembly costs. For example, if the labour cost of a sub-assembly is £10 and the labour cost of the actual item is £40, the Labour cost at this level would be £40 and the total standard labour value would be £50.

Products

Costs Tab

- Overhead Recovery Method** – Overheads can be recovered by;
 - A. Absolute value
 - B. Percentage
 - C. Combination Absolute value and percentage
 - D. Extended Overheads – Purchased Parts only

NOTE: Options A,B and C can be set on the Costs tab in the Overhead Recovery Method section. Extended Overheads are added on the Ext. Costs tab by way of the Add Extended Overhead action. Extended overheads can be added through the Product Overhead Types program.

- Automatically recover from standards** – Labour, overhead and activity based costs can be charged to an item either by using the standard value, or using the actual values. If standards are required, all items in this section should be checked.
- Latest Costs** – Calculated daily. Will look at the latest purchase or manufacturing finish.
- Average On-hand costs** – Calculated daily. This will average the cost of all on-hand inventory.

Products

Options Tab

The screenshot shows the WinMan Latest Release software interface. The main window is titled "WinMan Central" and "Products". The "Product" field is set to "9100-458". The "Product Options" section is expanded, showing the following settings:

Option	Value
Use Configurator	<input type="checkbox"/>
Sub Contract	<input type="checkbox"/>
Cascade MO's	<input type="checkbox"/>
Apply Provision	None
Provision Amount	0.00
Order Option	None
Available For Orders	<input checked="" type="checkbox"/>
Engineering Only	<input type="checkbox"/>
RoHS	Compliant
Build to ship	Never
MRP Consolidation	Days
Taxable	<input checked="" type="checkbox"/>

- Use Configurator** – A configurator is required
- Sub-Contract** – A sub-contract operation is required for the item
- Cascade MO's** – This option will create all sub-assemblies for a parent using the highest level MO number and appending a “/#” where # is a sequential number.

For example, if MO123 has a sub-assembly, MO123/1 would be the MO created. The cascade MO's option must be used with back-to-back manufacturing orders and is typically used with large items that have long lead times.

- Apply Provision** – Determines if an additional quantity should be added to proposed work orders generated from MRP. The additional quantity can either be a percentage or an absolute value.
- Provision Amount** – The amount that will be added to MRP proposed orders

Products

Options Tab

Order Options

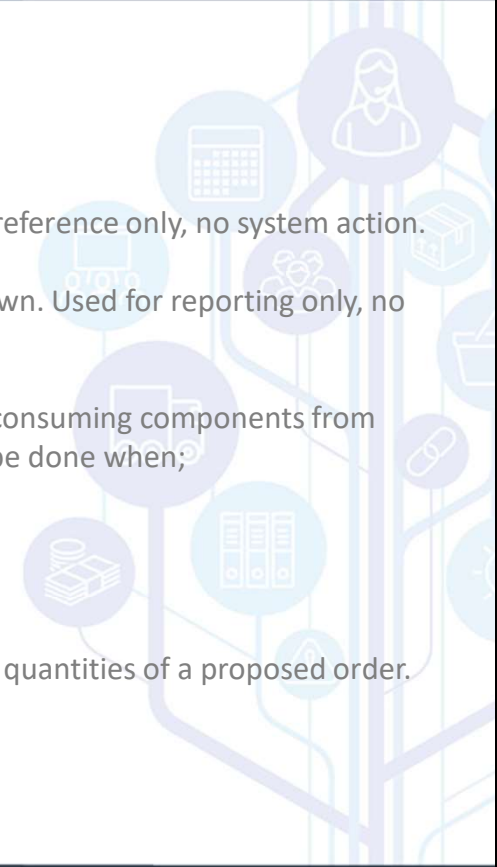
- Generate a Manufacturing Order for each sales order – A proposed MO for the quantity of the sales order line item will automatically be generated. Quantities on the MO will be updated to reflect the sales order provided the MO has NOT been released. Once the MO has been released any changes must be dealt with manually. For use with manufactured items only.
- Generate a Manufacturing Order for the optimum order quantity – A manufacturing order using the optimum order quantity will be automatically generated.
- Generate a Purchase Order for each sales order – A suggested PO for the quantity of the sales order line item can be automatically generated. The default vendor will be suggested, but can be changed when the sales order line has been created. For use with purchased items only. Quantities on the purchase order will be updated to reflect any changes from the sales order.

Available for Orders – Determines if the part can be added to a purchase order

Products

Options Tab

- Engineering Only** – A field that designates if the item is for engineering only. Used for reference only, no system action.
- RoHS** – Designate products that are RoHS compliant, non-compliant, exempt or unknown. Used for reporting only, no system action.
- Build to Ship** – An item will be backflushed when a shipment is created. This includes consuming components from BOM of shipped item, finishing item to inventory and picking item for shipment. Can be done when;
 - Always
 - Only if no stock
 - Prompt build to ship – user determines if backflush is completed
 - Prompt build to ship if no stock – will prompt user only if no stock is on hand
- MRP Consolidation** – Number of days a proposed order will look back and consolidate quantities of a proposed order.
- Taxable** – Reference field if the item is taxable. No system action taken



Products

Serial Numbering Tab

The screenshot shows the WinMan Latest Release software interface. The main window title is "WinMan Latest Release" and the menu bar includes "File", "Tasks", "Navigation", "Tools", "Windows", "Help", and "De". The "WinMan Central" window is open, showing the "Products" tab. The "Serial Numbering" section is active, displaying the product ID "9100-458". The following options are listed with checkboxes:

Option	Checkbox
Serial Number When Received	<input type="checkbox"/>
Serial Number On MO Completion	<input type="checkbox"/>
Serial Number On MO Issue	<input type="checkbox"/>
Serial Number When Shipped	<input type="checkbox"/>
Identify Serial Number When Issuing	<input type="checkbox"/>
Identify Serial Number When Picking	<input type="checkbox"/>

Serial Numbering can be done at the following times;

- When Received (Purchased Parts)
- On MO Completion (Manufactured Parts)
- On MO Issue (Purchased and Manufactured Parts)
- When Shipped (Purchased and Manufactured Parts)

Identify serial number when issuing – User must pick serial numbered items when being issued to a manufacturing order. If not checked, will issue serial numbers based on location consumption sequence then FIFO.

Identify serial number when picking – User must pick serial numbered items when being picked for a shipment. If not checked, will issue serial numbers based on location consumption sequence then FIFO.

Products

Price Tab

The screenshot shows the WinMan software interface. The title bar reads "WinMan Latest Release". The menu bar includes "File", "Tasks", "Navigation", "Tools", "Windows", "Help", and "Developer". The main window has a "WinMan Central" tab and a "Products" sub-tab. The "Prices" menu item is selected, showing a list of price information for product 9100-458.

Price List Id	Price List Description	Product #	Product Id	Product Descripti	Price Value	Quantity	Currency Displ
OEM1	OEM1	30	9100-458	100 Objective	\$ 189.873	0.00000	\$

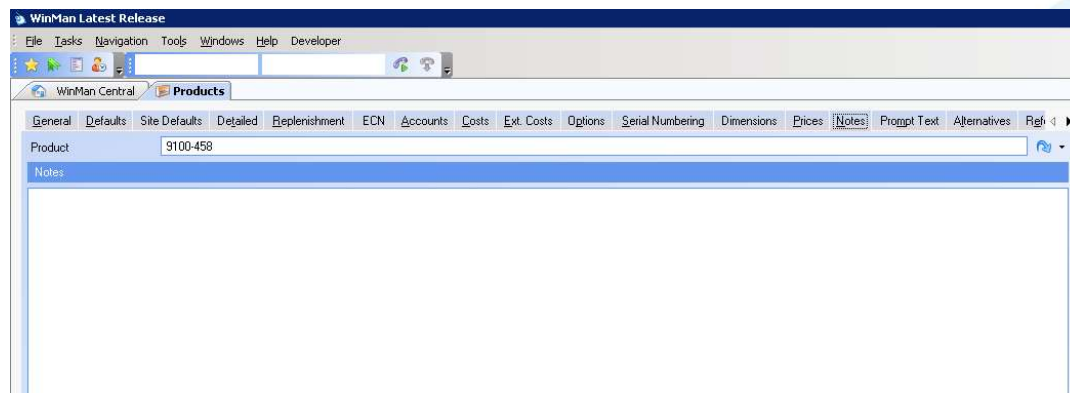
Products

Price Tab

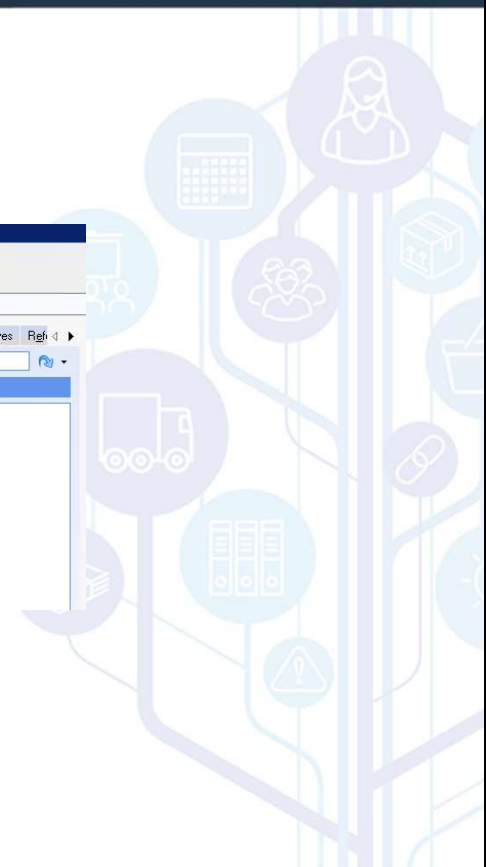
- ❑ A product can be linked to multiple price lists and have different prices on each price list. The Prices table links a price list and a product together and can be added using the action Add price. *(Note Prices can also be added in the Prices Program)*
- ❑ Price lists can be created and then related to a customer to provide a price list that one or many customer will receive for product pricing. Pricing records can then be created for a price list that specify the price of the item. A part can appear more than once on the same price list.
- ❑ A pricing entry can have effective dates, where a price is only good for a specified date range
- ❑ A pricing entry also has a GL account which is used for Revenue

Products

Notes Tab

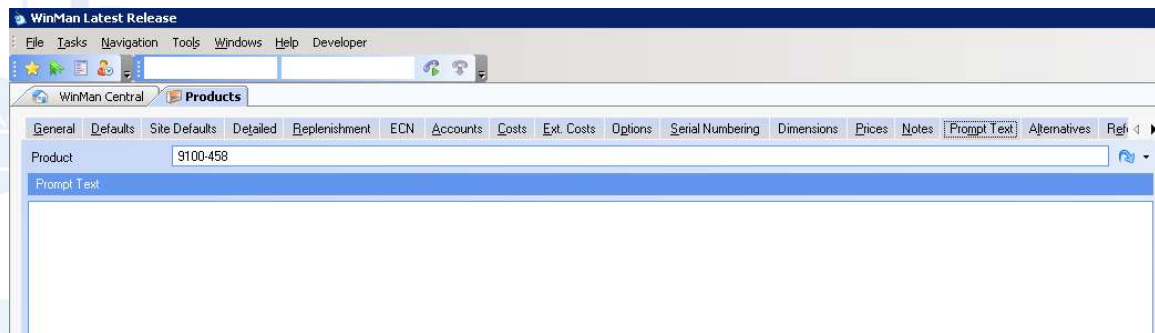


Notes about the part are added for reference



Products

Prompt Text Tab



Prompt text is a pop-up reminder in sales orders and purchase orders when the item is added

SYSTEM SETTING: By default prompt text is seen in both sales and purchase orders. Use the Products setting **Locations to show product prompt text** to control where prompt text is seen. Sales orders, Purchase orders, Both or None can be selected.

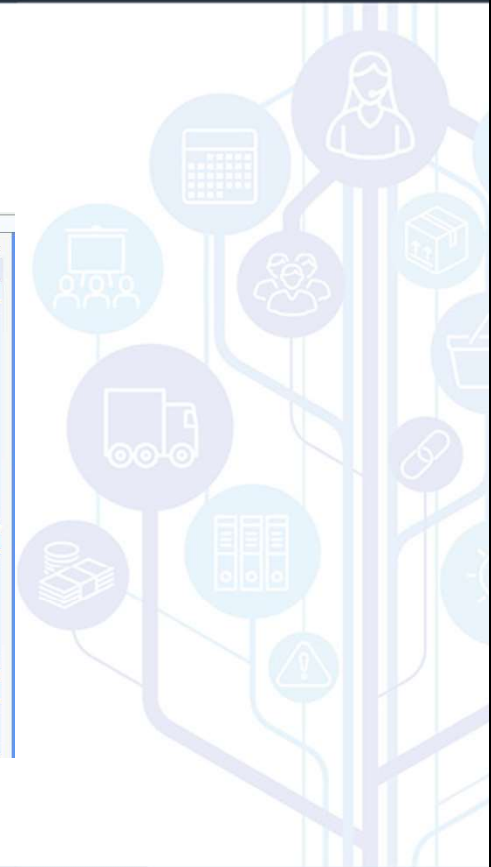
Products

Alternatives Tab

AlternativeProductId	AlternativeProductDescription	Engineering Change Note ID
1007-101	150 kV, Front Shield	

Manufacturer	Product Id	Their Product
ARROW ELECTRONICS	9100-458	EXF-9100

Product Id	Work Center Id	Description
9100-458	DRILL	Drill



Products

Alternatives Tab

- ❑ **Alternatives** – Alternative Part numbers can be added for reference. They are added by selecting the action Add Alternative Part. Multiple Alternative parts may be added.
- ❑ **Product Cross References** – Product Cross references are used to cross reference any manufacturer's part numbers. They are added by selecting the action Add Product Ref.
- ❑ **Alternate Activity Centres** – Alternate Activity Centres are used to track any alternate Activity Centres that could be used during manufacturing. They are added by selecting the action Add Activity Centre.

Products

References Tab – Customer Cross Reference

The screenshot shows a software window titled "Products" with a "References" tab selected. The "General" section includes fields for Product (9100-458), Description (10X Objective), Customer (C00004-0000), and Name (VACCO Systems). The "Detail" section includes fields for Customer's part, Customer's description, and Picking Location. There are "Save" and "Cancel" buttons at the bottom.

Customer cross references are used to track customer part numbers and customer part descriptions that might differ from the product number and description found in the products table. Customer cross references can also be added in the Customers program. To add a Customer cross reference in Products select the action **Add Customer Ref**

- Price** – The price that this customer is to receive for the part. This will override any price list.
- Discount** – The discount that the customer will receive for the part. This will override any discount calculated from products or customers.

Products

References Tab – Customer Cross Reference

- ❑ **GL Sales Account** – The revenue account that will be used. This will override any GL account found on a price list.
- ❑ **Customer's Part** – The customer's part number that will appear on sales prints. It also is used in part number look-ups throughout the system.
- ❑ **Customer's Description** – The customer's description of the part that will appear of sales prints.
- ❑ **Picking location** – A default location that inventory will be picked from before any other location. If there is not enough inventory in the Picking location, the remainder will be picked based on standard picking logic.

Products

Reference Tab – Supplier Cross Reference

The screenshot shows the SAP 'Products' window with the 'Reference' tab selected. The 'General' sub-tab is active, displaying the following fields:

- Product: 9100-458
- Description: 10x Objective
- Supplier: S00006-0000
- Name: RPM

The 'Cross Reference Information' section contains the following fields:

- Normal cost: \$ 0.00
- Date last quoted: Jun 15 2007
- Supplier Sequence: 999
- Discount applicable: [Default]
- Leadtime: 0
- Unit of measure factor: [Default]
- Receipt Batch Qty: [Default]
- Location: [Default]

Buttons for 'Save' and 'Cancel' are visible at the bottom of the window.

Supplier cross references are used as a place to store supplier part numbers as well as other much more information than is found in the customer cross reference. Additionally, supplier cross references are needed for MRP to suggest a vendor, sub-contracting, as well as Kanban. Supplier cross references can be added in Products or in Suppliers. To add a supplier cross reference in Products select the action **Add Supplier Ref.**

- Supplier** – Select the supplier that the supplier cross reference will relate to.
- Normal Cost** – The price that you buy the product from this specific vendor. This is the default price on the Purchase Order.

Products

References Tab – Supplier Cross Reference

- Date Last Quoted** – The last day the item was quoted from the vendor.
- Supplier Sequence** – The order that suppliers will be used with 1 being the highest and 999 the lowest. The supplier with the highest sequence number and within the lead time of the requirement will be suggested.
- Discount Applicable** – The discount that will be used on the purchase order. This will override any discounts in Products or Suppliers.
- Lead time** – The lead time for this part from this vendor.
- Unit of Measure Factor** – The unit of measure factor that this item is purchased in from this vendor.
- Receipt Batch Quantity** – The receipt batch quantity in supplier cross reference will over-ride the receipt batch quantity in Products.
- Location** – The location that the item is to be received into. This will override the location from Suppliers and Products.

Products

References Tab – Supplier Cross Reference

Supplier Cross reference Kanban fields

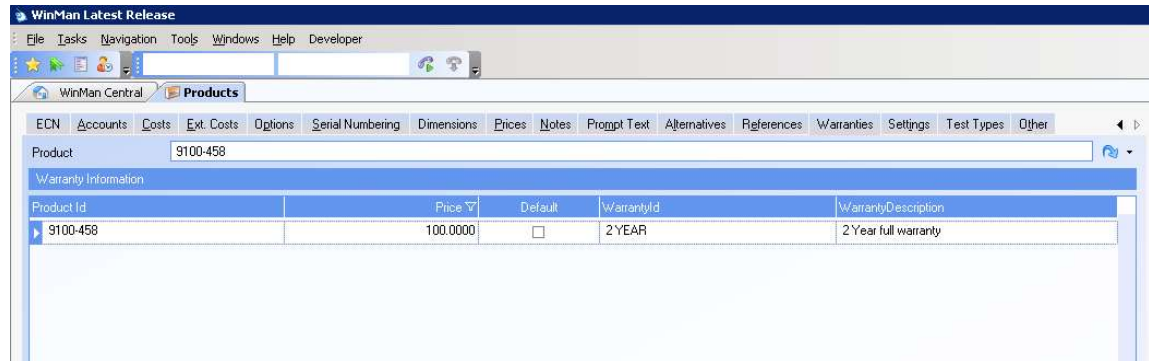
- **Original Quantity** – Original quantity of the contract for the part
- **Quantity Outstanding** – The quantity still outstanding (not received) from the contract. Automatically decreases with each Kanban receipt.
- **Minimum Stock** – The minimum stock that should be on hand. Can be used for reporting, no system action with this field
- **Maximum Stock** – The maximum stock that should be on hand. Can be used for reporting, no system action with this field
- **Date** – Date of last contract.
- **Kanban Delivery Days** – The days of the week that Kanban deliveries can occur. Used to calculate due dates for Kanban POs.
- **Supplier's description** – The supplier's description of the part that will appear on the Purchase Order print.
- **Supplier's part number** – The supplier's part number that will appear on the Purchase Order print.

NOTE: Price breaks can also be added to supplier cross reference records. When viewing supplier cross reference records, right click on the entry that is to receive a price break, and select the action Add Price Break. Specify the minimum quantity required to obtain the special price as well as what the special price is.

Products

Warranty Tab

Warranties can be linked to a part by using the action Add Warranty. Select the warranty to be added to the part, the price and if the warranty is the default (as many warranties as required can be added to the part). The warranties that are listed for a part are options on the sales order where a user can then add a warranty. The value of the warranty will then be added to the sales order line and be reported to the revenue account for that line.



The screenshot shows the WinMan software interface. The title bar reads "WinMan Latest Release". The menu bar includes "File", "Tasks", "Navigation", "Tools", "Windows", "Help", and "Developer". The main window has a tab labeled "WinMan Central" and a sub-tab labeled "Products". Below the sub-tab is a navigation bar with various options: "ECN", "Accounts", "Costs", "Ext. Costs", "Options", "Serial Numbering", "Dimensions", "Prices", "Notes", "Prompt Text", "Alternatives", "References", "Warranties", "Settings", "Test Types", and "Other". The "Product" field is set to "9100-458". Below this is a section titled "Warranty Information" containing a table with the following data:

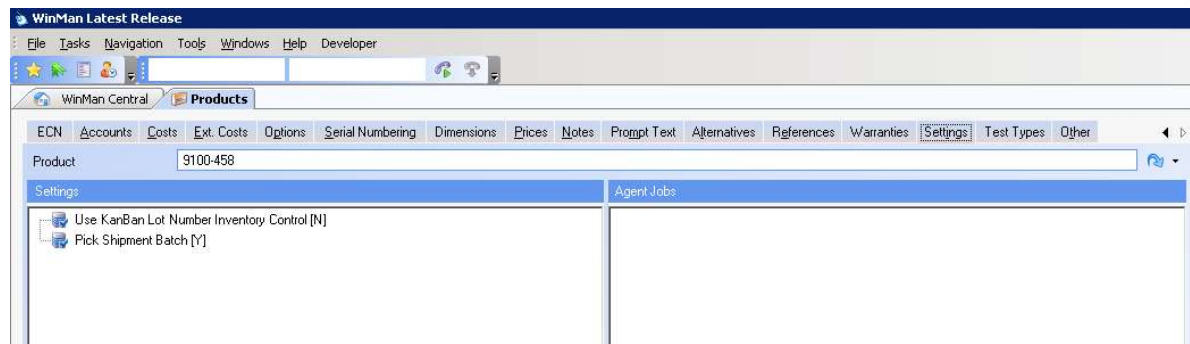
Product Id	Price	Default	WarrantyId	WarrantyDescription
9100-458	100.0000	<input type="checkbox"/>	2 YEAR	2 Year full warranty

Most items under warranty control will have serial numbering turned on as a way to identify the item. If serial numbering is not turned on, at time of shipping, items will be treated as serial controlled. A shipping line will be created for each unit with a quantity of 1 and in cases where no lot number exists (ie the item was stock adjusted on hand), the user will be prompted for a serial number.

A warranty can be created for a period of time (years, months, weeks, days). Warranties are then linked to parts which then can be sold on the sales order. The warranty then works with the RMA module to determine if a return item is covered under warranty, and when the warranty expires.

Products

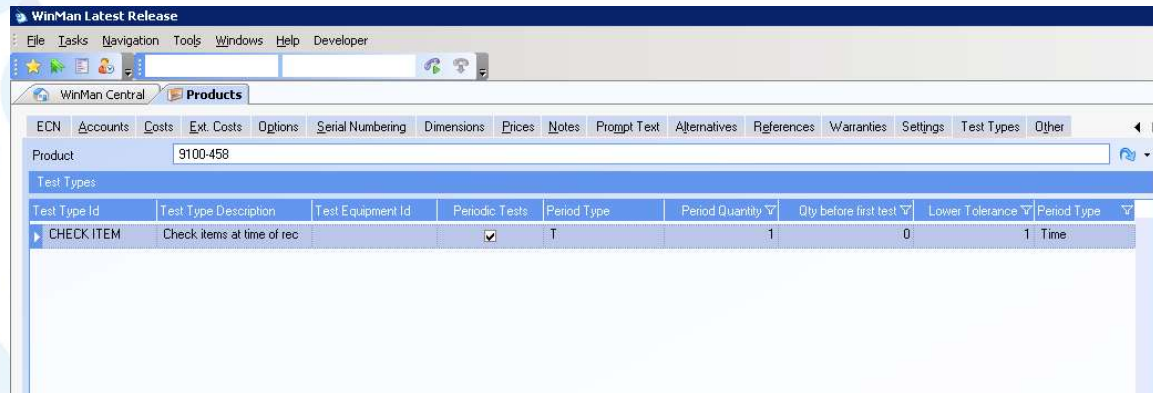
Setting Tab



- Pick Shipment Batch** – When set to Y, when creating a shipment, a user will pick which batches are to be shipped. When set to N, standard picking logic will automatically be done.
- Use Kanban Lot Number Inventory Control** – For use with the manufacturing Kanban program, this setting is applicable at the component level. If set to Y, when using the long form Kanban entry, only components with a matching lot number to the lot number specified for the parent will be used.

Products

Test Types Tab



WinMan Latest Release

File Tasks Navigation Tools Windows Help Developer

WinMan Central Products

Product: 9100-458

Test Type Id	Test Type Description	Test Equipment Id	Periodic Tests	Period Type	Period Quantity	Qty before first test	Lower Tolerance	Period Type
CHECK ITEM	Check items at time of rec		<input checked="" type="checkbox"/>	T	1	0	1	Time

Test types are displayed at time of receiving. They alert receiving users as to tests that need to be performed when the item is received. Multiple test requirements can be linked to a part, by using the action Set Test Type. Select the check box in the Include column of the dialog to set a test type.